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WILLOWTREE®

The destination is worth the drive: savings, speed, and satisfaction after WillowTree’s cloud migration

To bolster employee satisfaction and plan for the future of their business, WillowTree opted to move their Atlassian server solutions to the cloud. Since completing a thorough preparation process and making the switch, WillowTree has been enjoying a much faster, easier-to-use platform; saving money thanks to app optimization; and leveraging the freedom of being able to focus on mission over maintenance.

INDUSTRY

Technology

LOCATION

Charlottesville, VA, USA

NUMBER OF USERS

550+

ATLASSIAN PRODUCTS & APPS



Jira Software
Project and issue tracking



JSU Automation Suite for Jira Cloud
Maintenance-free Jira workflow



Confluence
Document collaboration



Zephyr for Jira
Test Management Cloud



Jira Service Management
High-velocity ITSM



Issue Checklist Pro Cloud
Checklists for Acceptance Criteria



Jira Misc Workflow Extension
Jira workflow automation



Figma for Confluence Cloud
Figma + Confluence. Always in sync

Big structural changes often manifest fear and uncertainty. Will the shift be hard? Time consuming? Worth it? But most of the time, when we really think through the decision and do everything we can to prepare, the transition isn't as scary as it seemed, and the destination is worth the drive. WillowTree experienced this first hand when they migrated to Atlassian cloud products.

As a digital product firm that creates mobile apps, responsive websites, voice skills, and more, **WillowTree** uses and builds modern technology every day. They've also earned a reputation for having the highest team and client satisfaction in the industry (a 77% Net Promoter Score, compared to less than 20% for most competitors). To practice what they preach and keep all their stakeholders happy, the company opted to move their Atlassian server solutions to Cloud Premium.

After completing a thorough preparation process and making the switch, WillowTree has met their migration goals and then some. In addition to enjoying a much faster, more intuitive experience, the team is saving money and taking advantage of several cloud-only apps and features that make their lives easier. Now, WillowTree can focus less on maintenance and more on their mission: being a trusted guide to the world's most admired companies, from process to product.

Preparation pays off

As an agile team, WillowTree opted for a phased approach to their cloud migration. They started with Confluence, which the entire firm uses to store and share project documentation, company news, and “anything that brings benefit to other people,” says Senior Program Director Kenneth Nielsen.

Kenneth and a small team of IT colleagues kicked off the process by using the [Confluence Cloud Migration Assistant](#) app to archive pages and apps they wouldn’t need going forward. They communicated launch plans with the rest of the team to set expectations and prepare them for potential bugs (think broken links and access issues), but they were pleasantly surprised at how seamless the transition was. “It was very quiet after launch. We heard so few questions and concerns from employees that we were almost worried the migration hadn’t worked,” Kenneth remembers.

Seeing the Confluence Cloud migration go so smoothly made WillowTree even more optimistic about moving their largest and most-used solution, Jira Software, to the cloud. Creative and IT departments use Jira Software for agile design and development. Similar to their Confluence Cloud preparations, the migration team cleaned up the server-based data, mapped it to the new instance, and audited their apps to be sure they were bringing the most important, highly used apps to the cloud. A few of the apps they used on server didn’t need to be migrated, since the same functionality is available natively in Atlassian cloud (like JSU Automation Suite).

Kenneth says his team over-communicated with employees so they knew exactly what was happening, when, and why, and what they would need to do after the migration was complete. Talking with them also helped coordinate calendars and ensure the migrations were executed during a time period that didn’t pose an issue for end users.

And again, WillowTree’s preparation paid off. “There wasn’t really much to the actual migration,” Kenneth says. “The migration wasn’t complex. It was the preparation and troubleshooting that ended up being the most important parts of the process: giving people access, getting links working correctly.”

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KENNETH NIELSEN

Senior Program Director

Since launch, WillowTree has been enjoying several cloud-only features and apps, including Roadmaps for program increment planning, a faster and more modern user experience, the native JSU Automation Suite app for cloud workflows, and advanced permission schemes. The team also added Jira Service Management Cloud and set up service desks for IT, Security, HR, and Global Support. With this expanded, cloud-based suite of solutions, the whole company can work more efficiently and collaboratively than before, trickling down into even faster, better delivery and service for their clients

Four tips for a smooth migration

Having reflected on their own migration, Kenneth and his team drummed up four key tips for others who are considering upgrading to the cloud:

1. Consolidate migration efforts to “optimize and shift” everything at once.

WillowTree chose to migrate one solution at a time, but they would do it differently if they could go back. “Migrating in a piecemeal way created a few problems, like issues with duplicate fields that needed to be merged,” Kenneth says. “That pain was a bit self-inflicted. If you can, use test instances over and over until you get a clean slate, and then do the migration all in one go, with a team on standby that can handle any issues.”

2. Investigate proactive solutions to unique challenges.

Every company has its own distinct setup and customizations that could make a migration more complex. For example, migrating one particular app's data from servers to the cloud was more complicated than WillowTree expected, so they built a custom script to solve the issue. Kenneth recommends building in time to address unforeseen challenges that could arise like this, and collaborating on solutions with Atlassian or other companies who have faced similar issues.

3. Over-communicate who, where, when, why, and what to expect.

Prioritizing transparency around the migration process made a huge difference for WillowTree. Kenneth says, "We recommend over-communicating as much as possible to the entire organization. We have a Slack channel where we post updates about Jira and Confluence so we can set expectations and iron out all the kinks. That way, there weren't any surprises."

4. Demonstrate how to use cloud solutions through documentation and training.

WillowTree employees were ultimately happy with the migration process and cloud improvements. Kenneth admits that providing more support upfront would have made the transition even smoother and easier on everyone. "We didn't have a lot of documentation," he says. "We should have built more resources for employees to help them learn how to do things."

Doing the work that matters

Although there are a few things Kenneth and the team would do differently in hindsight, the migration experience as a whole was simpler than they expected, and well worth the effort. Now, WillowTree is enjoying the savings, speed, and satisfaction that come with a robust, integrated suite of cloud-based solutions.

Kenneth and his team love the time and cost savings of having a streamlined system and automatic updates. "We've already saved money by optimizing our use of apps and add-ons. It's also been nice to spread out the costs each

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KENNETH NIELSEN

Senior Program Director

month rather than paying per year,” Kenneth says. “And before, we had to ask for updates, back up the database, and follow an old-fashioned way of doing things. Now with the cloud, you get the latest and greatest all the time. It’s done in a snap, and we don’t have to worry about doing anything. It just works.”

The only thing better than seeing improvements on the back end has been seeing them on the front end. Kenneth has been pleasantly surprised by the positive feedback he’s gotten from employees about performance. “The team is saying really positive things about performance and the experience,” he notes. “Everything is faster on the cloud: logging in, searching, loading pages, API queries, and more.

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That’s what means the most to WillowTree: supporting their team’s happiness as they do the work that matters. They believe satisfied employees lead to satisfied customers, and they go out of their way to support both. “WillowTree is the greatest company I’ve worked with,” Kenneth says. “They care, listen, and go above and beyond to make sure everyone is happy and heard.” With Atlassian cloud products, WillowTree has tapped into yet another way to keep this promise and deliver on their mission.

➤ Learn how you can lower costs and increase productivity by moving to Atlassian cloud. **Contact your local Solution Partner today.**